

Visual Research “101” – Session 1 – February 7, 2017

Workshop Summary: “First Things First”

Present: Michelle Demeyere, Christine Ryle, Monica Penner, Carol Elder, Elspeth Domville, Roy Harris, MaryJo Lavelle, Robyn Hall, Catherine Annau, Kathie McKenna

Skype: Laura Lucas, Wayne Pender, Pamela Grimaud

Elspeth Domville was the facilitator for the first of four planned sessions that will take place over the next year. These sessions are intended to provide a forum for visual researchers to share questions and experiences in order to advance the profession and learn from one another. A video recording of the session will be posted on the VRSC website and will be available for members.

For the first session, Elspeth outlined seven areas, which she thought would be a good place to start. Due to time constraints, only four were addressed, with the remaining three to be taken up at the next session. The seven areas were:

1. Questions to Ask the Client Before You Begin
2. Project Synopsis – to be discussed at next session
3. Archive Wish Lists
4. Budget for the Researcher
5. Production schedule – to be discussed at next session
6. What responsibilities does the producer have to the researcher – what will you need from producer – to be discussed at next session
7. Deal memos

1) QUESTIONS TO ASK THE CLIENT BEFORE YOU BEGIN

The most important questions to ask at the outset of a project are:

- Which rights does the client wishes to acquire?
- Who are the broadcasters?
- What is the budget?
- What are the technical specifications?
- Are there sources that the producer cannot use?
- What is the schedule?

There was a discussion about the overall budget and the percentage that should be allocated for visual research and for archival material. If projects are very archive heavy, researchers should ask what percentage of the budget is available to them.

One member wanted to know how to decide whether a project is worth investing your time in. Can you back away, and how do you check producers out? New Visual Researchers don't want to let opportunities slip away.

Members agreed that it could be tough in the beginning when you are trying to establish yourself but that it is important not to invest too much time until the producer checks out. It is very important to check out producers to get a sense of who the people are before taking on a project. Sources of research include Facebook, LinkedIn, and the production company's own website. Additionally, it was suggested that members ask for a synopsis right away, even if it's just a paragraph. It is okay to tell producers "I will get back to you". One member noted that if producers can't articulate their needs, then you don't want to work with them. Lack of communication, is a warning flag.

Other issues:

- *Sources* - How much time do you spend giving producers alternatives of different sources? One member said that she always provides different options. Another suggested that you ask the producer how much time they want devoted to the items on their list.
- *Budget* - How much pressure do you get early on to tell producers what the archive is going to cost? Some members reported that they are asked to do the budget on spec. Although at the beginning of a project it is hard to project what the project is going to cost, with more experience, Visual Researchers are able to guesstimate fairly accurately.
- *Managing Junior Producers*: Some members enjoy working with Junior Producers and build on going relationships, while others reported having been burned by doing work for 'free' or 'inexpensively', only to find that the producers go with someone else the next time.
- *Precision* - It is important to demand precision in what producers want **visually** not thematically.

- *Scheduling* – This can be tricky as projects often get pushed back and Visual Researchers often have to juggle various contracts. It is very important not only ask what the producer's schedule is but also to tell producers in writing what your own schedule is, (holiday, other projects, etc.) so you can point to it later if their project moves and there is any conflict about your availability.
 - *Time Management* – It is important to consider the number and location of sources when drawing up a budget and schedule. If you are sourcing from a single generic archive, then it will take less time than if you have many sources from different parts of the world.
 - *Limitations* - Know the limitations on your archive. For example: Smithsonian doesn't accept Pond5, some broadcasters wouldn't accept Pond5 or Historic Films because they don't think their licenses are tight enough, and others won't work with Shutterstock either. All of these limitations affect the budget.
 - *Costing Archive* – Be sure to check whether the broadcasters have preferred rates, as sometimes they are better than VRSC rates.
 - *Technical Limitations* – This will become increasingly important. 4K is going forward but currently there is not a lot of archive available in this format. Some broadcasters like National Geographic have a cap of 10% that is not HD. Also remember to budget for the up convert.
- 2) **PROJECT SYNOPSIS** – There was no time to discuss project synopsis so it was pushed to the next meeting.

3) **ARCHIVE WISH LISTS**

Members discussed what is the best way to develop and manage producers' wish lists and how to communicate with the client on an ongoing basis. A lively discussion ensued with the members' thoughts broken out below:

- *Synopsis* - In addition to the client's wish list, one member stated that 'as much as possible I like to get a synopsis, script and detailed wish list.' It is also good to get the mood or tone of the producers' requirements. The wish list might not get the tone.
- *Prioritization* - Make sure clients prioritize their wish lists.

- *Gathering information* - It is important to get as much information as possible at the outset. A script is great but often Visual Researchers don't see it. Projects move at faster pace today and written materials like scripts often aren't there. Get specific requests, something that would express a 'concept.' If not, you can waste a lot of time.
- *Getting involved early* - Get involved on a project as early as possible. Speak to the writer as well as the director because sometimes visuals can compete with the writing. Also problems can arise if writers base a script on visuals the producer can't afford. Don't predicate a film on \$25K piece of archive.
- *Managing the wish list* - How do you manage the wish list? The virtues of Excel, Word, Basecamp, and Google docs were discussed. Basic information to include on the worksheet: description, sources, contact, phone/email, the website where you found the still/footage, links to low rez images, personal notes. (The format was described as "like a stock report but on its side"). It was suggested having colour codes to indicate status of the footage/still or strikethrough to track. For example, one member highlighted a line on the Excel spreadsheet in green if it came in. If it hadn't come in the line was highlighted yellow, and grey was used for "not happening." It is important to assume the sheet is a work in progress and remember that each project is a little bit different and may require unique fields. The following templates were kindly submitted by Elspeth Domville.

- Archive Wish List Template

REQUEST	STATUS
Example: footage of a sunrise over New York City	Found at Pond5, Shutterstock, Getty has some but too expensive, nothing at Footage Farm.
Example: stills of the Empire State Building c. 1940	Found at the NY Public Library, The Image Works and Alamy. Have sent examples to the director.

- Archive Footage Log Template

ARCHIVE FOOTAGE NUMBER	SOURCE	DESCRIPTION	EPISODE #	COST	RESOLUTION	SUBMITTED BY	DATE	CREDIT WORDING
NT001	Pond5	17 clips showing sunrise over New York City	Episode 1	Varies per clip	Screener	Jane	Feb. 14/17	Pond5 (but check each clip for photog's credit as well)
NT002	WPA Film Library	New York City in the 1940's	Episode 4	\$20 US/second with a 30 sec. project minimum	Master	Dave	Feb. 14/17	WPA Film Library

- Archive Stills Log Template

	ARCHIVE STILLS NUMBER	SOURCE	DESCRIPTION	EPISODE #	COST	RESOLUTION	SUBMITTED BY	DATE	CREDIT WORDING
Example:	S001	The Image Works	3 stills of the Empire State Building	Episode 2	\$220 US/photo for perp or \$175 US/photo for 10 years	Screener	Dave	Feb. 14/17	The Image Works (but check each still for additional credit information)
Example:	S002	Alamy	2 stills of Pres. Obama	Episode 3	\$150 US/photo (already paid Feb. 1st on Visa)	Master	Jane	Feb. 14/17	Alamy

Sharing wish lists - Is it a good idea to share wish lists? Most members do not share wish lists, instead sharing information via the stocks log. A wish list can elicit more information about what the producer wants, or help refine what they want. Wish lists can turn into stock logs. Often editors don't read the lists, as they have no time to look at spreadsheet.

4) BUDGET FOR THE RESEARCHER

The discussion focused on how to assess if the time budgeted for the VR is adequate and included the following questions and topics:

- *Communication* - Communication with the producer is vital – It is important to keep communication going with producers so they are aware how many hours you are working on specific requests. Decisions need to be made early if you are spending too much time on specific items. It is easy for three days to go by on one or two items or to spend a fifth of your budget looking for a horse, for example.

- *Experience* - Experience is a good teacher – When you have all the parameters and have been doing it a while, it is very easy to budget. One member reported budgeting with “my gut” and being accurate.
- *Over budget* – What happens when the money runs out for the Visual Researcher? Some members reported finishing projects even to their own financial disadvantage, others were firmer, but this is an ongoing problem.
- *Billing flat fee or hourly* – Members reported that they usually wouldn’t work for a flat fee unless it is their own ‘love project’. One member reported getting burned on a flat fee when the project spanned a year, with work budgeted for the beginning and end, yet there were many, many emails during the year. Some members have a half-day minimum but also tracked hourly.
- *Tracking your time* - There was some discussion about what programs people used to track their time. One member uses a timer, another a day timer. One uses the calendar feature on the computer, customizing the calendar just for work. There are also Apps that can be purchased. None were specified in the meeting. With dedicated tracking members found they could bill down to the quarter of an hour.
- *Pro Bono* – Most members do this less and less. Clients often didn’t return.
- *Budget for backend* - Remember to budget for the backend. Producers forget that there is paperwork and clean up after materials are sourced.
- *Rates and Scale* – Members think rates and scales, which have been discussed many times over the years, should be established but they are not sure how to proceed. Currently there is no industry standard. One member reported billing at \$37.50 an hour. Most experienced members bill over \$300 a day. One member asked if the length of the contract affected rates members set and the consensus was generally no. Members expressed concern about undervaluing one’s own work and undercutting the rates of other members. There was a suggestion that VRSC should consider developing a rate scale.
- *Changing Professional Title* – There are discussions underway about changing the professional designation from Visual Researcher to Archive Producer. Elspeth is currently in talks with the Academy to explore how this could happen. The new title would reflect the responsibility that members

currently have. In addition to bringing their personal relationships with archive houses and various discounts to the table, Visual Researchers often do the work of both a lawyer and a producer.

- 5) **Production schedule** – There was no time to discuss the production schedule so it was pushed to the next meeting.
- 6) **What responsibilities does the producer have to the researcher – what will you need from producer** – There was no time to discuss this topic so it was pushed to the next meeting.

7) DEAL MEMOS

Deal memos are contracts outlining the terms of the Visual Researcher's work with a production company. Topics in a deal memo include the number of days you will be paid at an agreed upon rate, using your own home office, ownership of your research, etc.

Frequency of use - Deal memos are becoming increasingly frequent. Members report that now 20% of the time they are asked to sign them. One member noted that the deal memo gives the researcher a certain amount of legitimacy.

Devising a deal memo template - Because terms shift from memo to memo and from company to company, it was debated whether or not Visual Researchers should come up with their own template. Several members are currently working on creating a deal memo template for VRSC members.

Challenging the terms of the deal memo - One member reporting having to challenge the terms contained within one contract she was presented with. Problem clauses included one that would see the Visual Researcher terminated with no notice, yet the Visual Researcher couldn't quit. It was recommended that members ensure that the deal memo includes an end date and that members should negotiate the drawdowns and not just accept them. Members were warned not to sign any deal memos that assign to them responsibility for third party.

Contractor insurance - One member reported that she was required to get some and others wondered if it was worth acquiring.

Legal protection - The session ended with a suggestion that a future session explore how Visual Researchers legally protect themselves.